HOUSING MARKET INFORMATION

SENIORS' HOUSING REPORT
Manitoba

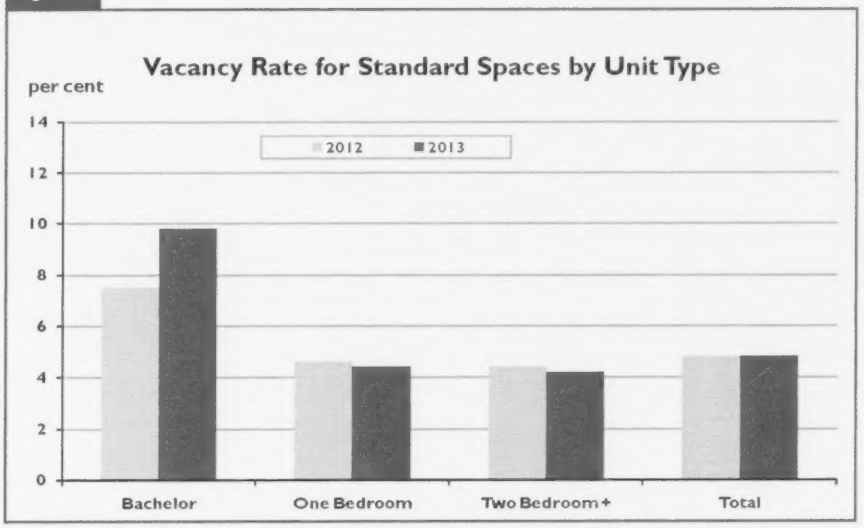
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2013

Highlights

- The overall vacancy rate for standard spaces in retirement homes across Manitoba stood at 4.8 per cent in 2013, unchanged from 2012.
- The overall average rent for a standard retirement space in Manitoba was $2,378 in 2013, compared to $2,338 one year earlier.
- In Manitoba in 2013, there were 34 facilities surveyed containing a total of 3,794 spaces and housing 4,056 residents.

Figure 1



Source: CMHC

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Manitoba Vacancy Rate of Standard and Total (Universe) Spaces

Vacancy

Overall vacancy rate unchanged

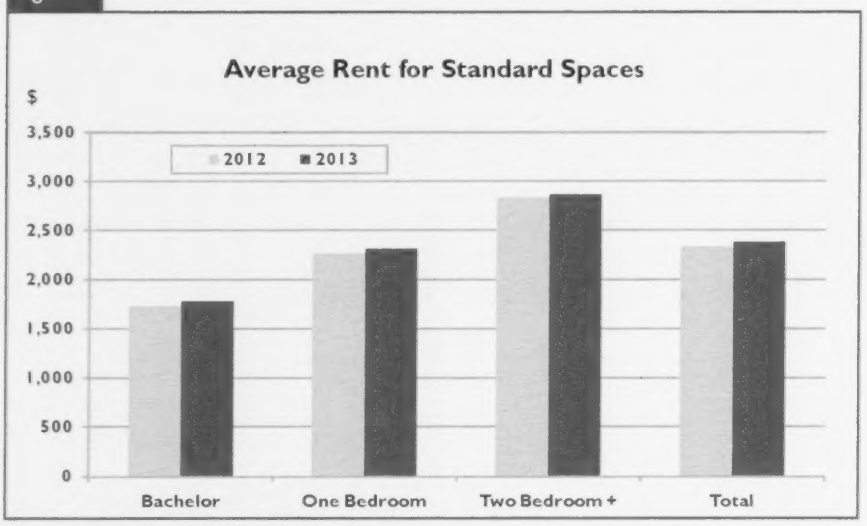
According to Canada Mortgage and Housing Corporation's (CMHC) Seniors' Housing Survey, the vacancy rate in standard spaces in seniors' rental residences in the province of Manitoba was 4.8 per cent in 2013, unchanged from where it stood in 2012. The seniors' survey targeted only private and non-profit retirement structures with at least 10 rental units and where the majority of residents are age 65 and over and have access to additional services not offered in traditional rental structures such as meal service, housekeeping, and laundry.

The vacancy rate in Manitoba's seniors' rental residences in bachelor spaces was 9.8 per cent in 2013, up from 7.5 per cent in 2012. As was the case last year, bachelor spaces recorded the highest vacancy rate by bedroom type in 2013. Vacancies in other bedroom types registered modest movement, with one-bedroom spaces moving from 4.6 per cent in 2012 to 4.4 per cent in 2013. Spaces with two bedrooms or more saw their vacancy rate move from 4.4 per cent last year to 4.2 per cent this year. This was also the bedroom type with the lowest vacancy rate in 2013.

Vacancy rate moved lower in upper rent ranges

Across the province, vacancy rates were highest among spaces in the upper rent ranges. However, spaces within these categories saw their vacancy rate move lower between survey periods. Spaces renting for more than $2,500 per month had a vacancy rate of 5.8 per cent in 2013

Figure 2



Source: CMHC

compared to 6.0 per cent in 2012, the highest vacancy rate for all rent ranges. The vacancy rates for spaces renting between $2,000 and $2,499 also moved down from 5.4 per cent in 2012 to 4.9 per cent in 2013. The lowest vacancies were recorded for spaces renting between $1,500 and $1,999, where the vacancy rate was 2.6 per cent this year, up from the 2.3 per cent recorded in 2012. The vacancy rate for spaces renting for less than $1,500 per month was 3.6 per cent.

Rents

Average monthly rents move higher

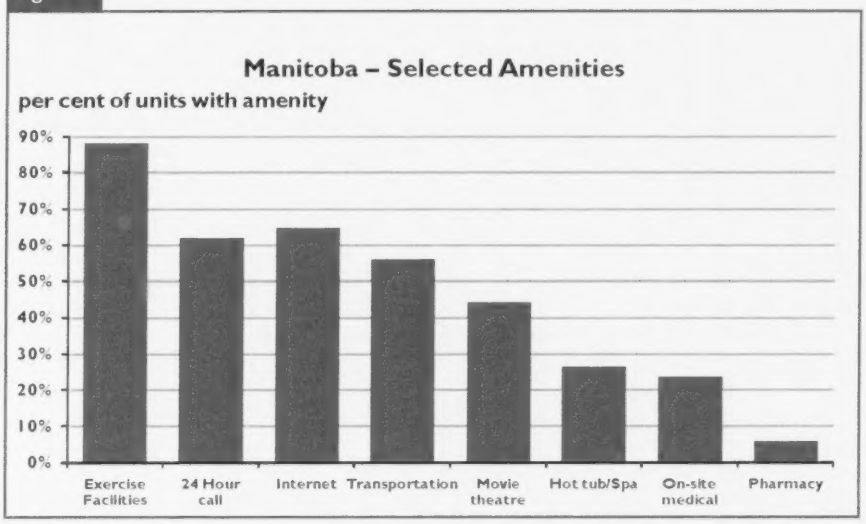
The average rent charged for seniors' Standard Spaces of all types on a province-wide basis was $2,378 per month in 2013, compared to $2,338 in 2012. The largest change in average rent was in bachelor spaces, which reported an average rent of $1,779 in the 2013 survey compared to a monthly average of $1,730 in 2012. The smallest change was in two bedroom + spaces where the average rent advanced from $2,834 in 2012 to $2,862 in 2013. This was also the unit type that commanded the highest rents.

Reviewing the universe of spaces by rent range, the largest share of spaces, at 43.3 per cent, rented for more than $2,500 per month. This was up from a 42 per cent share one year earlier. The next largest share was comprised of spaces renting from between $2,000 and $2,499 per month, which represented 31.4 per cent of the total universe in 2013. Only 4.6 per cent of all seniors' rental spaces in the province charged less than $1,500 per month in rent in 2013.

Variation in services and amenities

In order to qualify for the survey, seniors' facilities must offer an on-site meal plan. All seniors' facilities surveyed included this meal plan as part of the rent. Half of the structures reported the provision of two meals per day, making this the most popular meal program in this

Figure 3



Source: CMHC

year's survey. This also represented a higher proportion from 2012, when 48.4 per cent of structures offered this kind of plan. The share of structures providing three daily meals was 47.1 per cent in 2013, down from last year's survey when 51.6 per cent of structures offered this service. In 2013, 2.9 per cent of all structures reported a plan with only one meal per day compared to none being reported in the 2012 survey.

On site medical services were available in 23.5 per cent of all structures in 2013, down from 25.8 per cent in 2012. Meanwhile 14.7 per cent of all structures indicated having a registered nurse on-site in this year's survey, down from 16.1 per cent recorded in 2012. The most prevalent service was a 24-hour call bell, which was available in 61.8 per cent of all structures in the province. By comparison, this service was available in 64.5 per cent of all structures in 2012. The least prevalent medical service was an on-site pharmacy with only 5.9 per cent of structures offering this service in 2013. In the previous year's survey, this number was 6.5 per cent.

A majority of structures, or 88.2 per cent, had access to an exercise facility in 2013, up from 87.1 per cent one year earlier. As was the case in previous years, this was the most commonly available amenity offered to tenants. Internet access was the next most common amenity offered, with 64.7 per cent of all structures in the province offering this service. This was followed by transportation services, which were available in 55.9 per cent of structures compared to 61.3 per cent in 2012. Other amenities provided include movie theatres in 44.1 per cent of structures and spa or hot tub in 26.5 per cent of structures. Larger buildings, comprised of those with 90 or more units, tended to offer more amenities than smaller residences.

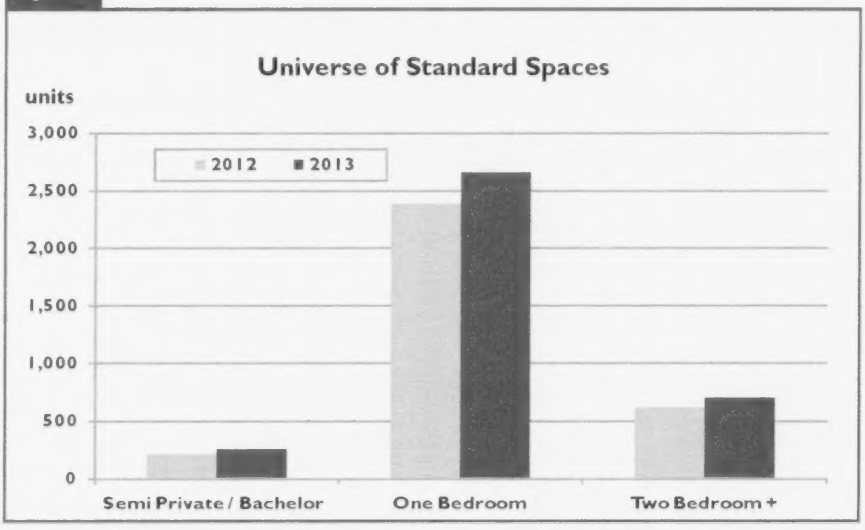
With respect to ancillary services, cable television was included in the rent of 47.1 per cent of residences in 2013, whereas telephone service was included in the rent in only 5.9 per cent of residences. In 79.4 per cent of residences surveyed in 2013, telephone services had to be arranged by the tenant.

Universe

Survey coverage

The total number of seniors' residences surveyed across the province in 2013 was 34, up from 31 in 2012. This resulted in a nine

Figure 4



Source: CMHC

per cent year-over-year increase in the total number of spaces to 3,794 in the 2013 survey. These housed 4,056 residents, which represents the equivalent of 4.7 per cent of Manitoba's estimated population over 75 years of age.

The majority of spaces, at 70 per cent, were one bedroom spaces, followed by two bedroom spaces at 18 per cent. Semi-private and bachelor spaces made up the remaining 12 per cent of spaces surveyed. Most of the structures, at 76 per cent, were of wood frame construction with the remaining structures comprised of concrete frame.

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1.1 Vacancy Rate (%) of Standard Spaces by Unit Type
Manitoba

Province	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Manitoba	**	**	7.5	9.8	4.6	4.4	4.4	4.2	4.8	4.8

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rate (%) of Standard Spaces by Rent Range ($)
Manitoba

Province	Less than $1,500		$1,500 - $1,999		$2,000 - $2,499		$2,500 and more		Total where rents are known	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Manitoba	**	3.6	2.3	2.6	5.4	4.9	6.0	5.8	4.8	4.8

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Manitoba

Province	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2012	2013				
Manitoba	3,794	4.5	4.5	34	4,056	87,100	4.7

[1] Source: Table 11-10, Population by age group and sex, medium-growth - historical trends (1981 to 2008) scenario (M1) July 1st - Manitoba, 2010 to 2036. Statistics Canada - Catalogue no. 91-520-X

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

2.1 Universe of Total Spaces by Unit Type
Manitoba

Province	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Manitoba	**447**	**2,651**	**696**	**3,794**

2.2 Universe by Unit Type
Manitoba

Province	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Manitoba	**447**	**2,651**	**696**	**3,794**
Standard Spaces	254	2,649	695	3,598
Non-Standard Spaces	193	2	1	196

2.3 Universe of Standard Spaces by Rent Range ($)
Manitoba

Province	Less than $1,500	$1,500 - $1,999	$2,000 - $2,499	$2,500 and more
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Manitoba	**4.6**	**20.7**	**31.4**	**43.3**

[1] % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

The following letter codes are used to indicate the reliability of the estimates:
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2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size
Manitoba

Province	Meals				On-Site Medical Services	Registered Nurse onsite[2]	24-hour call bell	Pharmacy
	Optional	# included in rent						
		1	2	3				
Manitoba	**0.0**	**2.9**	**50.0**	**47.1**	**23.5**	**14.7**	**61.8**	**5.9**
10 - 49	0.0	0.0	0.0	100.0	25.0	0.0	75.0	0.0
50 - 89	**	**	**	**	**	**	**	**
90 or more	0.0	4.0	52.0	44.0	28.0	20.0	68.0	8.0

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] Registered Nurse on site means a RN, not a RPN or LPN.

2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size
Manitoba

Province	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Manitoba	**55.9**	**0.0**	**26.5**	**44.1**	**88.2**	**64.7**
10 - 49	50.0	0.0	25.0	25.0	25.0	25.0
50 - 89	**	**	**	**	**	**
90 or more	64.0	0.0	32.0	52.0	100.0	80.0

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

3.1 Average Rent ($) of Standard Spaces by Unit Type
Manitoba

Province	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Manitoba	**	**	1,730	1,779	2,266	2,308	2,834	2,862	2,338	2,378

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

The following letter codes are used to indicate the reliability of the estimates:

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** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

O1 Building Structure Makeup (%)
Manitoba

Province	Concrete Frame	Wood Frame
Manitoba	**24.2**	**75.8**

O2 Ancillary Services, Cable and Telephone and Optional Costs (% of residences)
Manitoba

Centre	Services	Included in Rent (%)	Tenant Arrange (%)	Optional (%)	Average Cost if Optional ($)
Winnipeg CMA	Cable	46.7	36.7	16.7	**
	Telephone	6.7	76.7	16.7	**
Rest of Manitoba	Cable	50.0	50.0	**	**
	Telephone	**	100.0	**	**
Manitoba	**Cable**	**47.1**	**38.2**	**14.7**	**
	Telephone	**5.9**	**79.4**	**14.7**	**

O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
Manitoba

Province	Before 1990	1990 - 1999	2000 or later	Total
Manitoba	**	**	**4.4**	**4.8**

O4 Average Rents ($) of Standard Spaces by Date Residence Opened
Manitoba

Province		Before 1990	1990 - 1999	2000 or later	Total
Manitoba	Bachelor	**	**	1,818	1,779
	One Bedroom	**	**	2,305	2,308
	Two Bedroom +	**	**	2,825	2,862
	All	**	**	2,394	2,378

The following letter codes are used to indicate the reliability of the estimates:
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** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

Methodology
Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe. Non-profit residences must have at least one unit that is not subsidized.

To be eligible for inclusion in the 2013 survey results, a residence must:

- ✓ Have been in operation for at least one year, i.e., before January 2012
- ✓ Have at least 10 rental units (Quebec, Ontario, Prairies) or 5 rental units (Atlantic provinces and B.C.)
- ✓ Offer an on-site meal plan
- ✓ Not provide high levels of healthcare (defined as 1.5 hours or more of care per day) to all of their residents. Nursing homes and long-term care homes are examples of residences that were not included in the survey.
- ✓ Offer rental units. Life lease units and owner-occupied units are excluded from this survey.
- ✓ Have at least 50% of residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey, therefore, all seniors' residences in Canada meeting these criteria are included to be part of this survey.

Survey data were obtained through a combination of telephone interviews and fax and email responses. Information was obtained from the owner, manager, or residence administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions
Space: A space is a residential area that is rented out. Examples of spaces include: one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard Space: A space where the resident does not receive high-level care (i.e., the resident receives less than 1.5 hours of care per day.) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy Care Space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples include Alzheimer, Dementia and mobility support residents.

Respite Space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or Subsidy Space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: Refers to the actual amount a resident pays per month for their accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture Rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the cooperation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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